

The Electronic Grant Folder

The Electronic Grant Folder is a central access point for Grant related documents. It is the electronic representation of the Official Grant File and a shared business component accessible from any eRA system. Once invoked, end-users are presented with a user-friendly interface containing links to specific documents.

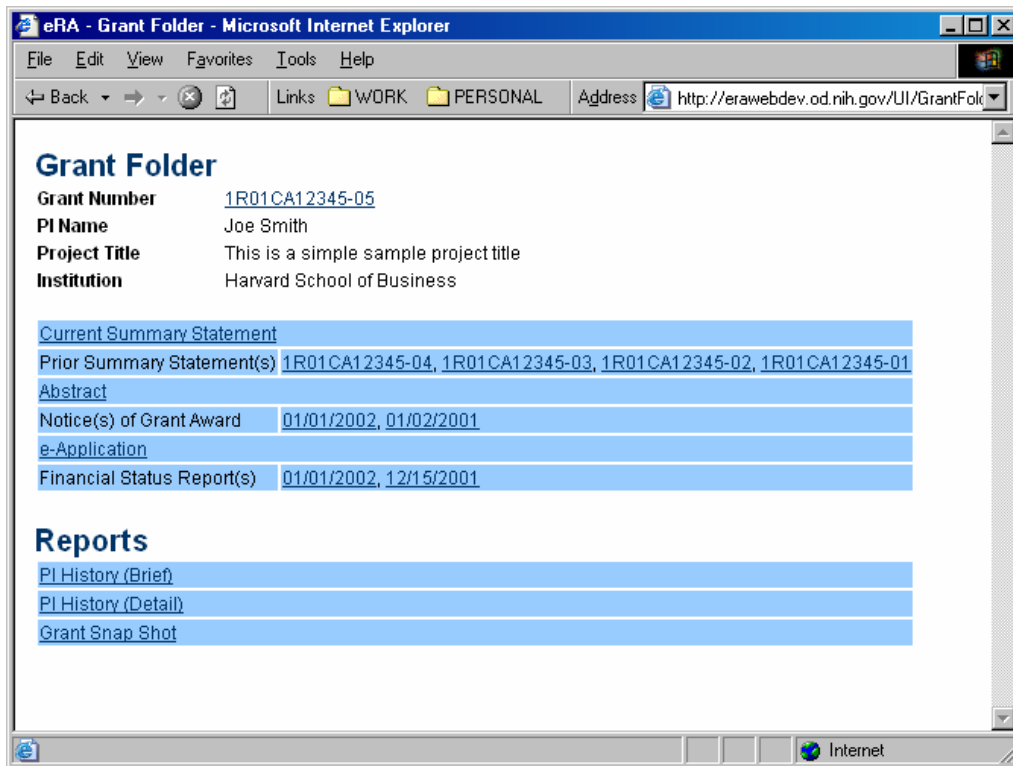
Although several grant related documents are currently available through the Electronic Grant Folder, it is the goal of eRA to accurately represent the Official Grant File by providing a means to electronically access all relevant documents that make up the Official Grant File.

Grant Folder Views

There are currently two Grant Folder Views: *Standard* and *Customized*.

- The Standard Grant Folder View is the default display where the system automatically groups specific (standard) Documents into sections.
- The Customized View is a requested display resulting from specifications given by the Individual Business Area.

The Standard Grant Folder UI



The Standard Grant Folder UI (continued)

The Standard Grant Folder User Interface is divided into three main sections: Header, Document and Reports. Documents listed in the *Reports* and *Document* sections include links to applicable documents. The *Header* section is display-only and shows information relevant to the Grant Application. The Grant Number displayed in the Header section is hyperlinked. Once invoked, the Grant Snapshot Report will display.

Document links are displayed only when documents are available.

I. Header Section

- Grant Number
- Principal Investigator's Name
- Project Title
- Name of Institution

II. Document Section: Standard Documents

- Current Summary Statement
- Prior Summary Statement(s)
- Abstract
- Notice(s) of Grant Award
- E-application
- Financial Status Report(s)
- Just in Time

III. Reports: Standard Reports

- PI History (Brief)
- PI History (Detail)
- Grant Snapshot Report

The Customized Grant Folder

Individual Business Areas are given the flexibility to customize their Grant Folders to display document links that are relevant to their Business practices.

Documents also can be organized into sections containing possible sub-sections without limitations (i.e., sample section headers: “Reports,” “Closeout Documentation,” “Correspondence and Memoranda,” “Special Documents”). The order of document display and groupings are also customizable; however, the “Header” section is mandatory.

** The following is an example of a **Customized Grant Folder**:

Grant Folder

Grant Number: 1R01CA123456-01A1
PI Name: Smith, John
Project Title: Sample Project Title
Institution: Harvard University

Summary Statement
e-Application

Reports

PI related Reports
PI History (Brief)
PI History (Detail)

Administrative Reports
Grant Snapshot
Meeting Agenda

Mailers
Assignment Mailer
Summary Statement Mailer

Current Grant Folder Documents

The following documents are currently available for Grant Folder display:

- Current Summary Statement
- Prior Summary Statement(s)
- Abstract
- Notice(s) of Grant Award
- Latest Notice of Grant Award
- E-application (Grant Image or e-Snap)
- Financial Status Report(s)
- Latest Financial Status Report
- Just in Time Document
- PI History (Brief)
- PI History (Detail)
- Grant Snapshot Report
- Progress Report Face Page
- Fellowship Proposal Face Page
- Transmittal Sheet
- Abstract (Awarded Grant)
- Population Tracking Grant Snapshot Report
- Face Page—CGAP-related grants
- Budget Page—CGAP-related grants
- Checklist Page—CGAP-related grants
- Application Cover Letter—CGAP-related grants

- **Closeout Letter 1 (Available January 2004)**
- **Closeout Letter 2 (Available January 2004)**

Making Changes to the Grant Folder

Business Areas desiring changes to their Grant Folders should initially consult with the corresponding eRA Analyst and supply the applicable information listed below for proper implementation. The corresponding eRA Analyst will then forward the request to the Grant Folder Analyst.

Adding New Documents

When requesting the addition of new document(s), the following information is needed:

- ✓ eRA Business Area
- ✓ Name of document to be added (supply document # if applicable)
- ✓ Section to include the document
- ✓ Point of origination (if known)
- ✓ Contact information of individual familiar with the document if the document is created outside of eRA

Removal of Documents and Structural changes

When requesting the removal of existing documents or any changes involving the order of document display or groupings, the following information is needed:

- ✓ eRA Business Area
- ✓ Name of document to be removed (if applicable)
- ✓ Specifications relating to the restructuring of the Grant Folder (i.e., grouping specifics, addition of new section , request to display the Reports section before the Document section)